

See discussions, stats, and author profiles for this publication at: <https://www.researchgate.net/publication/287483834>

Roma poverty in Bulgaria: how to understand it and what to do about it?

Article in *Naselenie* (Sofia, Bulgaria: 1983) · January 2013

CITATIONS
0

READS
69

1 author:



Andrey Ivanov
European Union Agency for Fundamental Rights
24 PUBLICATIONS 121 CITATIONS

SEE PROFILE

Some of the authors of this publication are also working on these related projects:



UNDP research on Roma vulnerability [View project](#)



Conceptual aspects of sustainable human development [View project](#)

ROMA POVERTY IN BULGARIA: HOW TO UNDERSTAND IT AND WHAT TO DO ABOUT IT?¹

Andrey Ivanov

The analysis and views contained in this paper do not necessarily reflect the official position of the European Union Agency for Fundamental Rights.

Fundamental Rights Agency

andrey.ivanov@fra.europa.eu

Abstract. *The article analyzes the issue of Roma poverty and the possible ways for its quantification. In the introductory part, the author presents the basic concepts and approaches to the definition of poverty, then applies them to the Roma using the data on the status of Roma households from surveys conducted by UNDP, the World Bank and the European Commission. The author concludes that multidimensional indicators are more appropriate for tracking the multi-dimensional phenomenon of Roma poverty. In the third part the article tests an indicator that integrates the main aspects of Roma poverty and allows for highlighting the quantitative contribution of each dimension of deprivation to the overall „poverty and social exclusion outcome.“ The author concludes that the proposed method is particularly relevant for the purposes of current policies aimed to tackle poverty among the Roma.*

Key words: Roma inclusion, marginalised groups, poverty monitoring.

INTRODUCTION

In the last two decades, the term “poverty” has become colloquial to the term “Gypsy”, or “Roma”, the accepted name for these communities. The definitional change was an attempt to escape the pejorative connotations of “Gipsy”, which has gained the firm associations with an “underclass”. Almost a decade ago, the decrease of Roma poverty has been put on governments’ political agendas and formulated as an explicit commitment of the countries participating in the Decade of Roma Inclusion. The EC later joined in with its EU Framework of Roma inclusion, putting additional political weight behind the attempts to lift Roma out of poverty.

It is unclear, however, what poverty we are talking about. “What is poverty?” is apparently an easy question, but its simplicity is misleading. This apparent simplicity often drives researchers, activists and policy makers into equally simplistic schemes for addressing the issue.

The current analysis defines the Roma poverty in broader terms.² Using the data from the regional surveys among Roma communities at risk of marginalisation and

¹ This article was translated by Mr. Aleksandar Ivanov.

² This article applies the analytical framework elaborated in the regional study on Roma poverty and its human aspects to the case of Bulgaria. See Ivanov, Andrey; Kagin, Justin. (2014). Roma poverty in a human development perspective. Roma Inclusion Working Papers. Bratislava: UNDP (forthcoming). The author is grateful to Julia Georgieva, Jaroslav Kling and Alexander Ivanov for assistance provided in the preparation of materials and data analysis.

their non-Roma neighbours in Central and Eastern Europe, the analysis tries to go beyond the intuitive understanding of the issue. The adequate definition (similarly to an adequate diagnosis) is a precondition for an adequate intervention. This is particularly important today, in the wake of the new programming period of the European Commission, when the resources devoted for addressing Roma poverty will be larger in an order of magnitude – and thus the potential for possible damage due to misled policies.

SOURCES AND CONSTRAINTS OF THIS RESEARCH

“There are no quantitative data on the situation of Roma households” is a popularly held view, yet untrue as there is plenty of data. What is missing, however, is comparability and methodological consistency – studies rarely use the same (or similar enough) methodology and tools. Data from different „Roma“ surveys is rarely comparable, both across individual surveys and between those and the standardised statistical tools such household budget surveys, or labour force surveys.

A major source of ethnically-disaggregated data is the population census. Despite the fact that Roma tend to underreport their ethnic identity, 325 343 Bulgarian citizens self-identified as “Roma” in the 2011 population census,³ making it the third largest community in Bulgaria, coming right after the Bulgarian and Turkish ones. More than a half of the members of the Roma ethnic community live in urban areas (55.4%).

Still, census data is not sufficient for in-depth analysis of the status of Roma and its determinants. There is no Roma sample in LFS, or HBS, which is why the necessary data on the status of Roma is being generated through custom surveys. Bulgaria is privileged in this respect as it is among the few countries where detailed surveys of Roma households are being periodically conducted and the results, as well as the methodology and questionnaires, are publicly available. A good example in that regard is the surveys of the Open Society Foundation.⁴

The current analysis, however, is based on the data set of the surveys of UNDP (from 2004) and UNDP/WB/EC (2011)⁵ of the Roma households at risk of marginalisation and non-Roma living in close proximity. There are several reasons for that. First, the data are comparable for all countries of Central and Eastern Europe, which allows such an analysis to be made for those countries as well. Second, the analysis refers to a number of in-depth thematic regional studies based on the same data set, which provide extra depth and insights into the sector-specific dimensions.⁶ Third, the

³ NSI, 2011 population census, http://www.nsi.bg/census2011/PDOCS2/Census2011_ethnos.xls

⁴ Open Data, <http://opendata.bg/opendata.php?q=7&s=7>

⁵ The survey of 2004 was prepared and implemented by UNDP. The survey of 2011 was implemented jointly by UNDP, the World Bank and the European Commission, Directorate General “Regional and Urban Policy”.

⁶ The data base is accessible from the UNDP web-site, <http://www.undp.org/content/rbec/en/home/ourwork/povertyreduction/roma-in-central-and-southeast-europe/>

seven years perspective is more appropriate for grasping the changes since the launch of the “Decade of Roma Inclusion,” 2005-2015. This was the period when the issue of the full and equal participation of Roma in the lives of their societies was firmly put in the policy agenda. While the efforts are paying off in some ways, the overall results are far from the initial expectations. Fourth, the UNDP survey complements the data on the status of households with information about the behaviour patterns and value attitudes of the respondents, which allows for a link between these and the socio-economic status to be made. Finally, the survey was administered on two samples – Roma at risk of marginalisation and non-Roma living in close proximity (and sharing socio-economic characteristics of the areas inhabited by the Roma surveyed). Thus the data allows for two levels of comparability: between the two groups, and on core socio-economic indicators – also between them and the national averages.⁷

The two data sets (that of Open Society and UNDP), however, are largely comparable because both follow the methodological framework for defining the universe of study firstly proposed by the team of UNDP in 2004: a combination of external (territorially determined) criteria, such as segregated Roma neighborhood, and self-identification (self-determination as “Roma” at the beginning of the interview).⁸ The same approach to defining the universe of study was also applied by the Fundamental Rights Agency in 2011.⁹ Thus, all three surveys examine Roma at risk of marginalisation due to their segregated status, rather than an abstract “Roma” population. This makes the results particularly relevant in terms of integration policies in the respective countries.¹⁰

VARIOUS APPROACHES TO POVERTY ESTIMATION

There are various ways of defining and quantifying poverty. Most of them yield different results, often contributing more to the confusion around the issue than helping to explain the root causes of poverty. The choice of the method and poverty thresholds has an obvious impact on the outcomes of the analysis and its policy implications.

⁷ The survey was following the format of an integrated household survey and a number of questions in the questionnaire are identical to similar nationally representative surveys. For more information about the study and its methodology see Ivanov Andrey; Kling, Jaroslav; Kagin, Justin. (2012). Integrated household surveys among Roma populations: one possible approach to sampling used in the UNDP-World Bank-EC Regional Roma Survey 2011. Roma Inclusion Working Papers. Bratislava: UNDP, http://issuu.com/undp_in_europe_cis/docs/integrated_roma.web_1_/3#share.

⁸ Ivanov, Andrey (ed.). (2006). At Risk: Roma and Displaced in South-East Europe. Regional human development report. Bratislava: UNDP. <http://europeandcis.undp.org/poverty/show/A3C29ADB-F203-1EE9-BB0A277C80C5F9F2>.

⁹ FRA (2014). Roma Pilot Survey – Technical report: methodology, sampling and fieldwork. <http://fra.europa.eu/en/publication/2014/roma-pilot-survey-technical-report-methodology-sampling-and-fieldwork>

¹⁰ Ivanov, Andrey. (2012). Quantifying the Unquantifiable: Defining Roma Populations in Quantitative Surveys. *Население Issue no.3-4 /2012*, pp. 79-95. <http://www.cceol.com/asp/issuedetails.aspx?issueid=529e262d-a405-433c-806c-a5ccf96369eb>

In principle, all poverty definitions can be grouped by two main characteristics: (i) the definition of classification criteria (how poverty is defined) and (ii) the choice of the threshold (the numerical value reflecting the selected poverty criterion beyond which the subject of analysis is considered “poor”). As regards definitions, poverty estimates can be **objective** (defined by sets of characteristics that are objectively measurable and, ideally, are not subjected to the individual’s interpretations) and **subjective**, or perception-based measures, in which the assessment of the individual of his/her status is reflected. The first group is set up according to some objective criteria (i.e. amount of calories to be consumed, a certain ‘minimum consumption basket’, or measurable amount of disposable income). The second group argues that the objective criteria cannot capture poverty and only people themselves can define whether they are poor, or not (for example, one might live in a rich country with high incomes but under pressure of unaffordable consumer models and thus assess his/her status as “poor”).

The data for both objective (status registration) and subjective (perception registration) measures are usually derived from surveys. However, the similarity of the source should not blur the difference between the two. In the first case, the status is determined by an external agent (an analyst assessing the data reported by the object of the poverty analysis), while in the second case the status is determined by the person reporting the status.

Another grouping of poverty measures can be done based on the number of dimensions being considered. The uni-dimensional analysis, as the name suggests, uses one particular aspect of poverty as a sufficient proxy – be it money (monetary approaches), or natural units (calories of daily consumption). They are simple, but to the degree of simplicity reducing complex phenomenon to a single variable. The multidimensional poverty measures are more comprehensive in reflecting well-being, but their complexity comes at the cost of difficulties in aggregating the various indicators.

One can distinguish between **absolute** and **relative** poverty depending on the way the poverty thresholds are being defined. In both cases the thresholds are numeric cut-off values, the difference is in the way the value is being determined. The absolute poverty threshold is derived from the concept of “needs” and implies both, a universal standard and some absolute minimum of unacceptable deprivation. In the case of the relative poverty approach, the threshold determining whether a person is poor is set relative to the status of other members of the society. The median (of incomes, or expenditures) is usually used as a reference point, while the value of the most commonly used threshold is 60% of it. In other words, relative poverty captures lower living standards in comparison to other people in that country, which does not necessarily imply a low standard of living, or deprivation.

Table 1 summarises the possible approaches regarding poverty quantification and monitoring. It is obvious that there might be at least fourteen different answers to the question “What’s the poverty rate in a country x, or for group y?” – and all of them would be correct in their own way. When communicated without the explicit methodology applied, without the relevant metadata available, or detached from the specific context (which is most often the case), the poverty estimates can be used in a highly manipulative manner.

Table 1

Different Approaches towards Defining Poverty

Uni-dimensional	Monetary	Income based	Absolute poverty lines	National thresholds specific for individual countries, in national currency	1. Nationally specific income-based poverty rates		
				Internationally comparable thresholds	2. Severely poor with incomes below 2.15 PPP\$		
			Relative poverty lines		60% of the median income	3. “Just poor” with incomes below 4.30 PPP\$	
					Absolute poverty lines	National thresholds specific for individual countries, in national currency	4. Severely poor (below 40% of the median incomes)
			Internationally comparable thresholds	5. “At risk of poverty“ (below 60% of the median incomes)			
		Expenditure based		Absolute poverty lines	National thresholds specific for individual countries, in national currency	6. Nationally specific expenditure-based poverty rates	
						Internationally comparable thresholds	7. Severely poor with expenditures below 2.15 PPP\$
			Relative poverty lines	Share of the median expenditure	8. “Just poor” with expenditures below 4.30 PPP\$		
					Relative poverty lines		Share of the median expenditure
						10. “At risk of poverty“ (below 60% of the median expenditures)	
	Food energy intake (FEI)				11. Nationally specific FEI-based poverty rates (vary by climate conditions, rural/urban distribution, type of occupation etc.)		

Multidimensional	Internationally comparable (OPHI developed MPI and used for international comparisons, also in the Global HDRs published by UNDP)		12. Multidimensional poverty index
	Nationally specific following the OPHI developed MPI		13. Severely poor
			14. “Just” poor

The same applies to Roma poverty in Bulgaria. Which concept is the most relevant in the case of the Bulgarian Roma and what does the data say? This is the major subject of interest of this analysis.

THE MONETARY DIMENSIONS OF POVERTY ABSOLUTE AND RELATIVE POVERTY RATES

The data from the UNDP surveys allow for outlining the scale of monetary poverty among Roma. Figure 1 summarises the absolute poverty profiles of Roma households and their dynamics between 2004 and 2011. The left scale denotes the poverty headcount (the share of people living below the two absolute poverty lines, 2.15 and 4.30 PPP\$ per day, equivalent income, or expenditure), while the right scale denotes the poverty gap.

Data suggests that significant progress has been made in regard of monetary poverty reduction between 2004 and 2011, both on income-based and expenditure-based estimates. Using the standard World Bank 4.30 PPP\$ (Purchasing Power Parity Dollars) absolute threshold, the poverty headcount measured by incomes fell from 50% in 2004 to 33% in 2011. At the same time the poverty gap decreased by 4 percentage points from 17% to 13%. The expenditure-based poverty estimates fell by a similar magnitude, from 46% in 2004 to 29% in 2011 with poverty gap decreased similarly by 4 percentage points (from 13% to 9%).

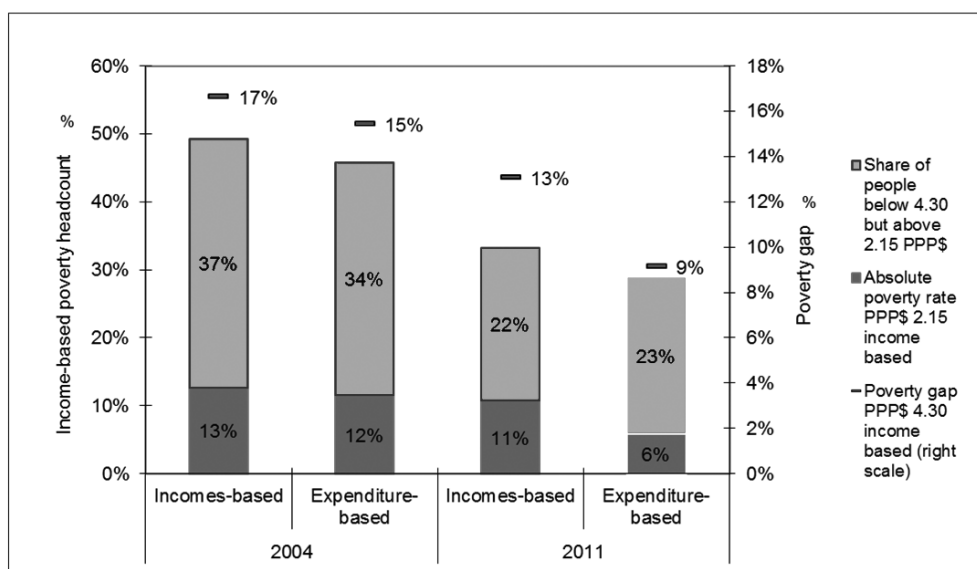


Figure 1: Monetary poverty rates and depth for Roma 2004-2011

The profile of relative poverty is slightly different and reveals deeper disparities between Roma and their non-Roma neighbours. Relative poverty rate among Roma is 81% - almost identical to the estimates of OSF (79%).¹¹ As shown in Figure 2, the

¹¹ In calculating the relative poverty rate the value of 277 BGN was used as poverty threshold 2011. Eurostat uses BGN 285 in 2011.

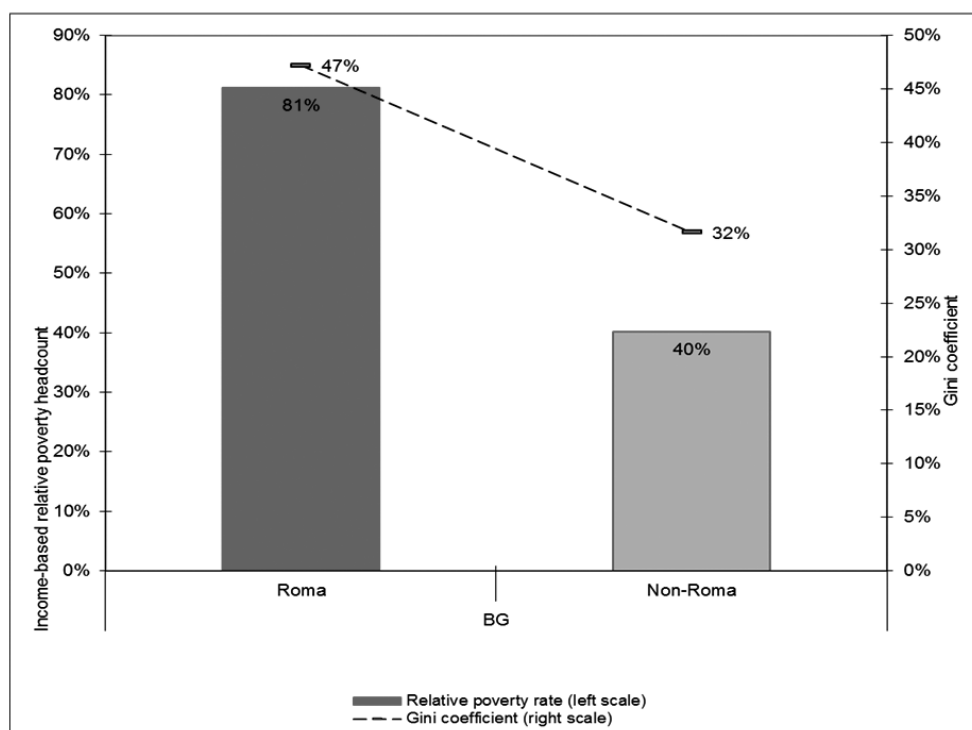


Figure 2: Relative poverty rate (ARPOP at 60% of the median equivalent income, left scale) and Gini coefficient (right scale)

difference is more than two times outlining the magnitude of horizontal inequality, in this case among Roma and non-Roma. However, the poverty rates for both groups are higher than the national average (22.2% in 2011¹²), suggesting that poverty among both groups is not just driven by ethnic factors. Probably both groups share the depressed socio-economic environment, which is why employment opportunities and income generation (directly influencing monetary indicators of poverty) are more limited than the average in the country. It is worth noting that the inter-group inequality is deeper among the Roma.

INCOMES AND EXPENDITURES

While the amount of money a household has is important, the source of this income and the ways in which it is spent are just as important. These aspects constitute an important angle of the analysis, outlining significant similarities and differences between the two groups.

¹²http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/People_at_risk_of_poverty_or_social_exclusion

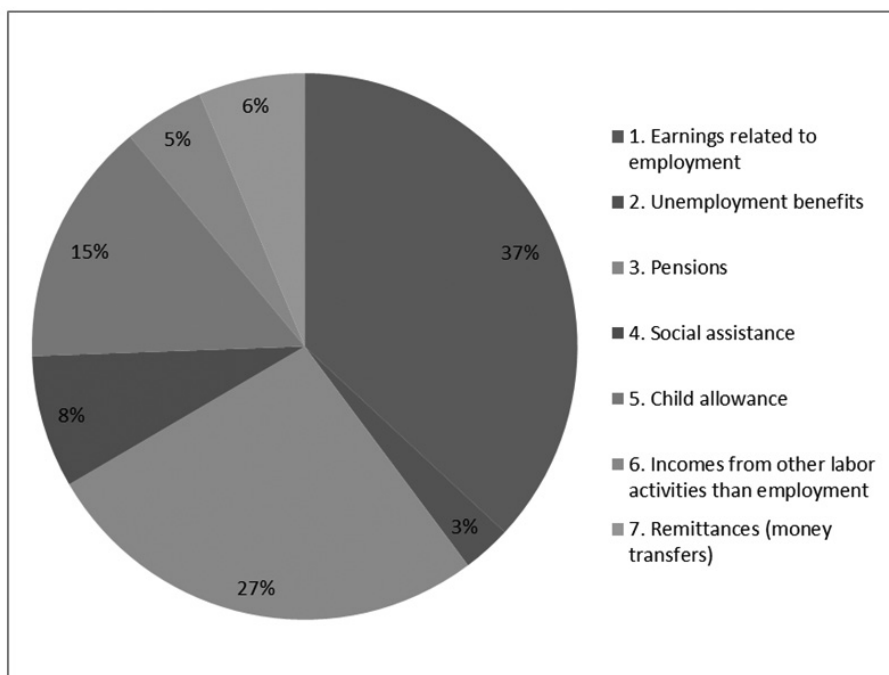


Figure 3a: Structure of Roma household incomes

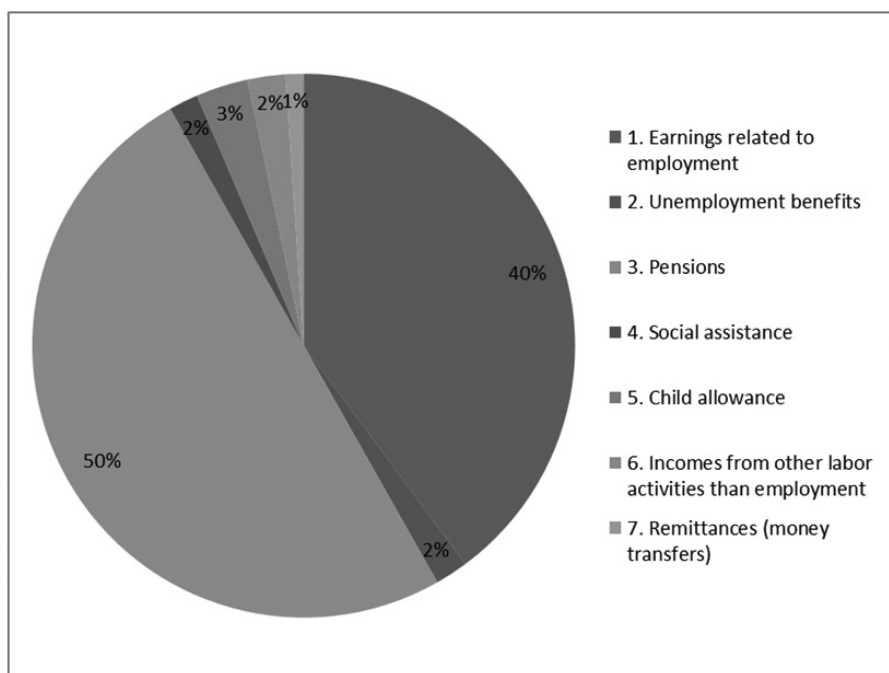


Figure 3b: Structure of non-Roma household incomes

The earnings related to employment constitute 37% and 40% of the total household incomes of Roma and non-Roma respectively.¹³ When incomes from other labour activities than employment are added, the total share of labour incomes reaches 42% for both groups, suggesting that the notorious image that Roma do not work is exaggerated, to say the least.

The big differences come from pensions (50% of the incomes of non-Roma and only 37% of the incomes of Roma), child benefits (respectively 3% and 15%) and social assistance (respectively 2% and 8%). Unemployment benefits constitute a small share of the incomes – 3% in the case of Roma and 2% of non-Roma. In other words, both groups are equally dependent on social transfers (unemployment benefits, pensions, social assistance and child allowance). In the case of Roma, benefits constitute 52% of the total incomes and in the case of non-Roma – 57%. The difference is in their structure – the transfers for non-Roma are dominated by pensions, while those for the Roma are dominated by child allowances and general social assistance.

Thus, according to the data, the message “Roma are misusing the social system” does not seem to be easily defensible either. Both groups depend on the state for their survival; simply their demographic profiles are different. This also determines the different nature of the social transfers. Those for the non-Roma are devoted primarily to providing opportunities for decent (if possible) living of a generation that has completed its active employment activity and the transfers are oriented in that regard towards the past. In the case of the Roma, the transfers are targeted more explicitly at the young generation and aim to help it develop its skills and talent. In that regard, the transfers can (in theory at least) be considered as an investment from which the society will benefit in the future.¹⁴ Whether the theory is implemented in practice is a rhetorical question.

The structure of the household expenditures is also similar for both groups. In both cases they are dominated by food and everyday household goods, which constitute 49% of the total expenditures of Roma and 44% of non-Roma households. The second biggest portion of the monthly budget goes to housing, paying rent, bills, etc. and constitutes 15% of Roma and 18% of non-Roma’s budgets, respectively. However, these similarities are misleading – significant differences are observed in the absolute values. Roma household expenditures on food constitute 83% of the expenditures of a non-Roma household, 73% of the housing and utilities expenditures, 59% of those on clothes and 80% of those on medicines. Surprisingly, both groups spend more money on purchasing alcohol and cigarettes than on education, transportation, and clothes, including shoes.

¹³ Data from the study of the World Bank and the Open Society states “wages and salaries” as the source of 32.3 percent of household income of the Roma.

¹⁴ The idea of Roma Inclusion as a “smart economics” is not new and has been consistently promoted by the World Bank. For Bulgaria see Bogdanov, Luchesar; Angelov, Georgi. (2006). Integration of Roma in Bulgaria: Necessary Reforms and Economic Effects Report within the project of the “Open Society” - Sofia. De Laat, Joost; Bodewig, Christian. (2011). Roma Inclusion is Smart Economics - Illustrations from Bulgaria, Czech Republic, Romania and Serbia. World Bank, ECA Knowledge Brief 39, April 2011, http://siteresources.worldbank.org/INTECALEA/Resources/KB_V39_ROMA_Inclusion.pdf. The results however should be treated with caution because the model for calculating the benefits is simplistic and is based on assumptions regarding the labour market that are hard to defend at the local level in the localities in which Roma live.

POVERTY SEEN FROM THE PERSPECTIVE OF THE FINAL OUTCOMES

The monetary approaches to defining poverty make sense under the assumption that the financial resources can be (and are) translated into benefits that make human life complete and meaningful, but this is not always the case. In addition, the standard of living does not depend only on the availability of financial resources. Goods and services can be produced and traded in kind, or simply misappropriated. For example, when a person is travelling on a public transport without a ticket, s/he consumes a transportation service that is not recorded in the statistics of the household expenditures. This is why it is reasonable to look at the real picture of poverty not through the lens of the “universal equivalent”, but directly, analysing the real living standards of the individuals and households.

EDUCATIONALLY POOR

Education is seen as one of the key determinants of Roma poverty and low chances in life. Data from the two UNDP surveys highlights some major educational differences between Roma and their non-Roma neighbours. The average years of education among the working population aged 25-64 is significantly different among the Roma and non-Roma population and with pronounced gender gaps.¹⁵ The average length of education of a Roma Male is approximately 7.1 years, compared to 11.1 years for a non-Roma male (Figure 4). The difference between Roma and non-Roma women is even larger – 6.2 and 11.3 years respectively, a difference of 5.1 years suggesting higher vulnerability of Roma women to their limited educational opportunities.

The comparison between the different age groups highlights different trends for different groups. The average time spent in education for Roma is slightly higher among the young than among the adults, while it declines among the non-Roma. The change is small, but may be indicative of the growing territorial-driven disparities in quality of education in Bulgaria and its drift towards „elitisation,“ allowing for a „peaceful coexistence“ of two diametrically opposite phenomenon in the same age groups: illiterate youngsters and few winning international competitions in maths or physics. It is also possible for the results to reflect the implications of the migration in recent years, when higher educated and trained people were more prone to leave Bulgaria.

A fewer number of years spent in education logically translates into lower self-declared literacy rates.¹⁶ In 2011 this indicator is 89% for Roma aged 16-24, which

¹⁵ For an in-depth analysis of the educational challenges faced by Roma see Bruggemann, C. (2012). Roma Education in Comparative Perspective. Analysis of the UNDP/World Bank/EC Regional Roma Survey 2011. Roma Inclusion Working Papers. Bratislava: UNDP. The findings are consistent with the results of the survey conducted by FRA in the 11 Member States. See: FRA. (2012). The situation of Roma in 11 Member States - Survey results at a glance. Publications office of the European Union: Luxemburg..

¹⁶ Self-reported literacy rates are defined as the ratio of the surveyed population aged 16 and older who reported to be able to read and write as a share of the total surveyed population aged 16 and older

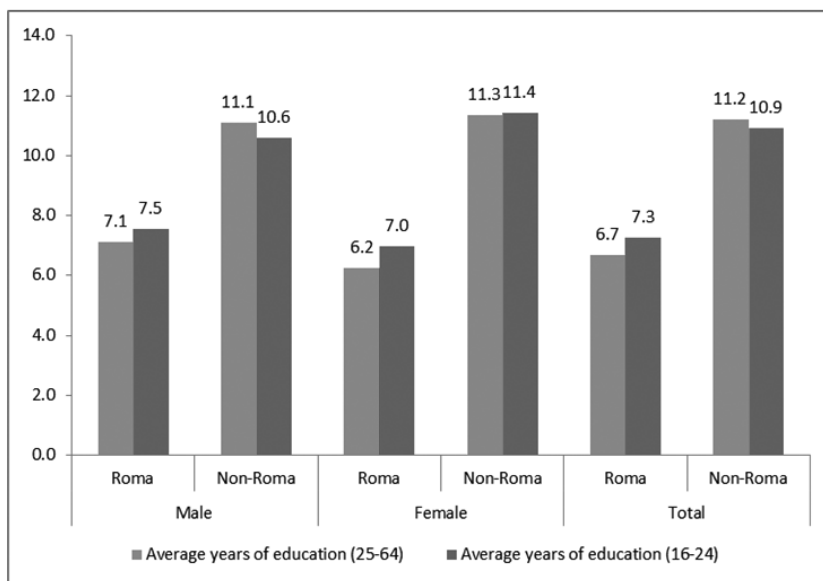


Figure 4: The average time in education

is an improvement of 7 percentage points compared to 2004 (for non-Roma in close proximity it is 99%). The gap among women is more pronounced (the self-declared literacy rate of Roma women is 11 percentage points lower than of non-Roma women). The low values of self-declared literacy are largely due to the fact that Roma drop out of school early. The share of Roma aged 18-22 who are not in the education system and have not completed level of education higher than lower middle (ISCED2) and upper secondary (ISCED3c) is 87%. This share among non-Roma living in close proximity to Roma was 44%, the national average being 12.8%.¹⁷ All this results in significantly lower levels of achieved education of Roma compared to non-Roma. The real picture may be more pessimistic if the quality of the acquired education is taken into consideration.

The roots of the problems in regards to the primary and secondary education reach as deep as pre-school. Data highlights the existence of huge difference in pre-school enrolment between Roma and non-Roma children (aged between 3 and 6). Only 38% of the Roma children attend pre-school institutions, whereas the share of non-Roma neighbours' children attending pre-school is 79%, or over twice as much (with 76% national average rate of enrolment in pre-school institutions in 2011-2012). The gap in enrolment rate between Roma and non-Roma students is not significant for compulsory education (for the old and youth) - 82% of those of Roma and 84% of the non-Roma children aged between 7 and 15 years are enrolled in institutions

¹⁷ The national average values for 2011 are taken from Eurostat, <http://epp.eurostat.ec.europa.eu/tgm/table.do?tab=table&init=1&plugin=1&language=en&pcode=tsisc060>

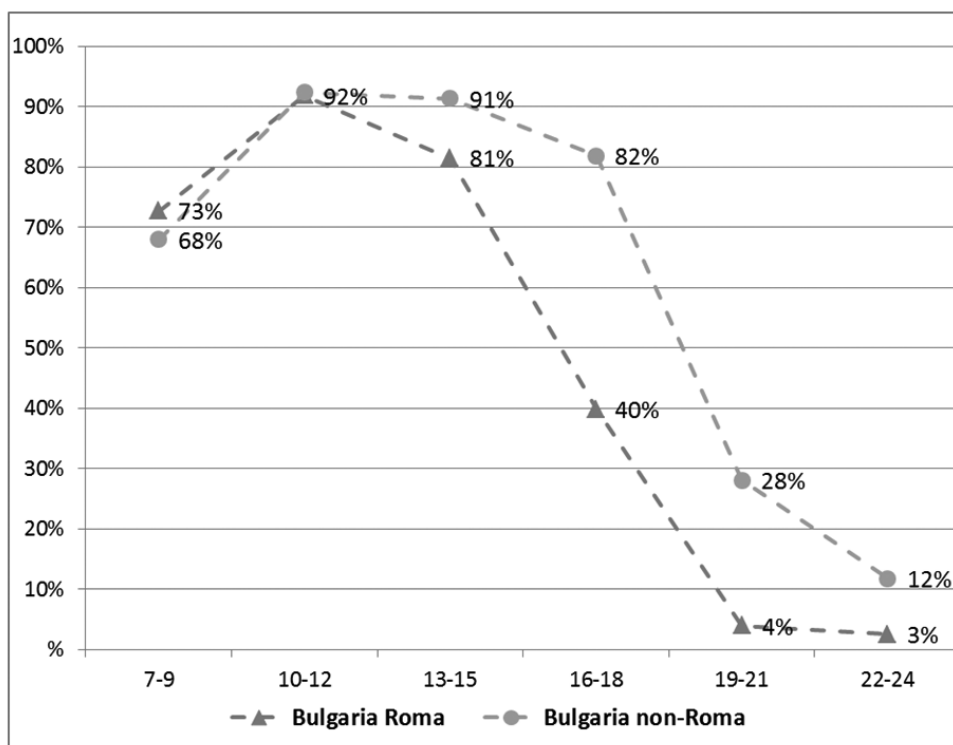


Figure 5: Share of the children in the respective age groups continuing their education

providing compulsory education. As Figure 5 shows, the lower secondary level of education is critical, beyond which the gap in education attainment rapidly opens. Ultimately, only 25% of Roma children aged 16-19 continue their education, compared to 78% of non-Roma.

POOR IN REGARDS WITH EMPLOYMENT OPPORTUNITIES

The data confirms the stable negative trends in employment of Roma throughout the entire post-communist period.¹⁸ As Figure 6 shows, employment rate for Roma is 21 percentage points lower than for their non-Roma neighbours (respectively 34% and 54%). 40% of the Roma and 20% of the non-Roma aged between 15 and 64 are unemployed. These figures are close to the estimates of the World Bank and OSI, according to which 70% of the Roma are

¹⁸ For an in-depth analysis of the employment challenges faced by the Roma see O'Higgins, Niall (2012). Roma and non-Roma in the Labour Market in Central and South Eastern Europe. Roma Inclusion Working Papers. Bratislava: UNDP. http://issuu.com/undp_in_europe_cis/docs/roma_employment/1

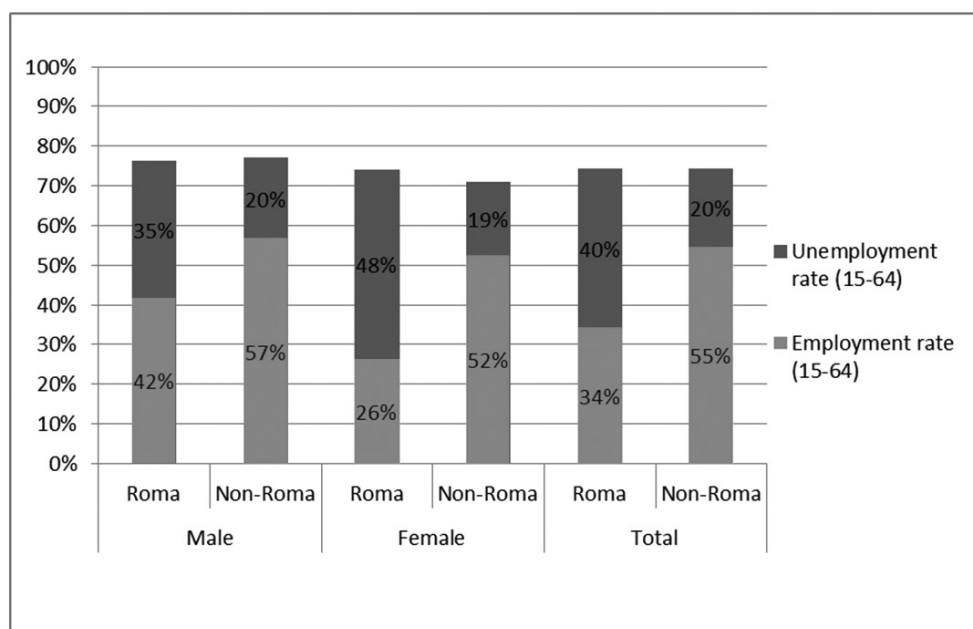


Figure 6: Employment and unemployment rates

inactive at the labour market (meaning they either do not work, are not on any leave from work, or are not engaged in own business) and the unemployment rate of Roma is 36%.¹⁹

Data visualised in Figures 7a and 7b also outline the deep gender disparities between the two groups, as well as disproportions between generations.²⁰ Roma women are in a much more disadvantaged position – employment rate among them is just 26% whilst it is 52% among non-Roma females. However, when the data is disaggregated by age, the problem with youth (age group 15-25) becomes apparent. Young Roma women are again in a more disadvantaged position.

Roma possess lower level of education and qualification (Figure 8), which, to certain extent, explains the low employment rates. However, even when parameters like attained education and adequacy of qualification are controlled for, a significant part of the gap in employment rates between Roma and their non-Roma neighbours remains unexplained, suggesting that it is due to other factors such as quality

¹⁹ Metodiev Maria (coordinator), Abramova, Svetlana Belcheva, Dragomir (2012). Beyond the myths and prejudices: Roma in Bulgaria. EU inclusive - data transfer and exchange of good practices between Romania, Bulgaria, Spain and Italy concerning inclusive of the Roma population.. Editura Dobrogea: Open Society, p. 109.

²⁰ For an in-depth analysis of the gender disparities among Roma and non-Roma see Cukrowska, Ewa; Kóczé, Angela. (2013). Interplay between gender and ethnicity: exposing structural disparities of Romani women. Analysis of the UNDP/World Bank/EC regional Roma survey data. Roma Inclusion Working Papers. Bratislava: UNDP.

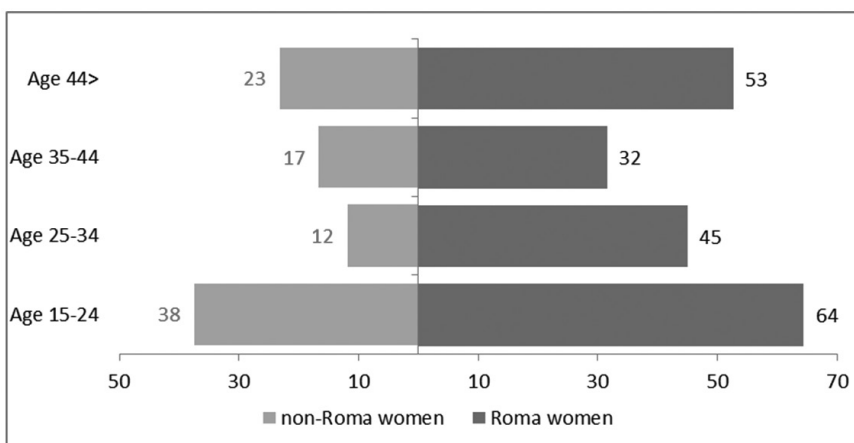


Figure 7a: Unemployment rates by age and sex (women)

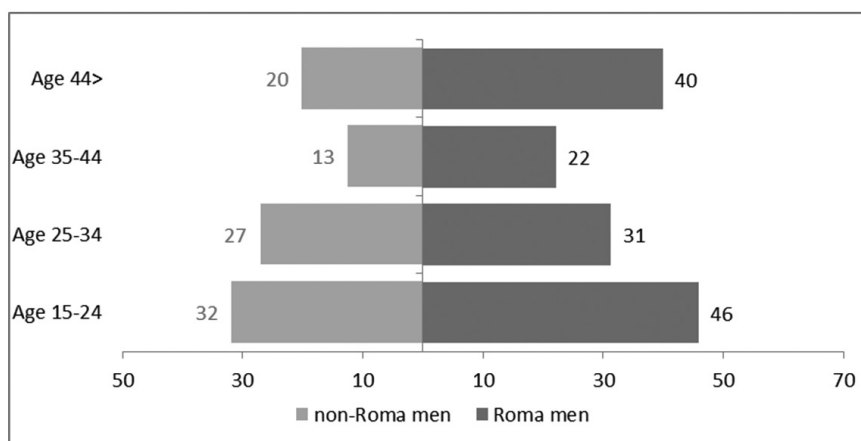


Figure 7b: Unemployment rates by age and sex (men)

of education, prejudice, or discrimination.²¹ The survey of the World Bank and the Open Society Foundation from 2011, for example, shows that only 32.3% of the registered unemployed Roma respondents stated “I am not sufficiently qualified” as a reason why they cannot find employment. This share drops to 22.6 among the non-registered. “Ethnic identity” is given as a reason for unemployment by 9.7% of the

²¹ O’Higgins, Niall (2012). Roma and non-Roma in the Labour Market in Central and South Eastern Europe. Roma Inclusion Working Papers. Bratislava: UNDP. http://issuu.com/undp_in_europe_cis/docs/roma_employment/1

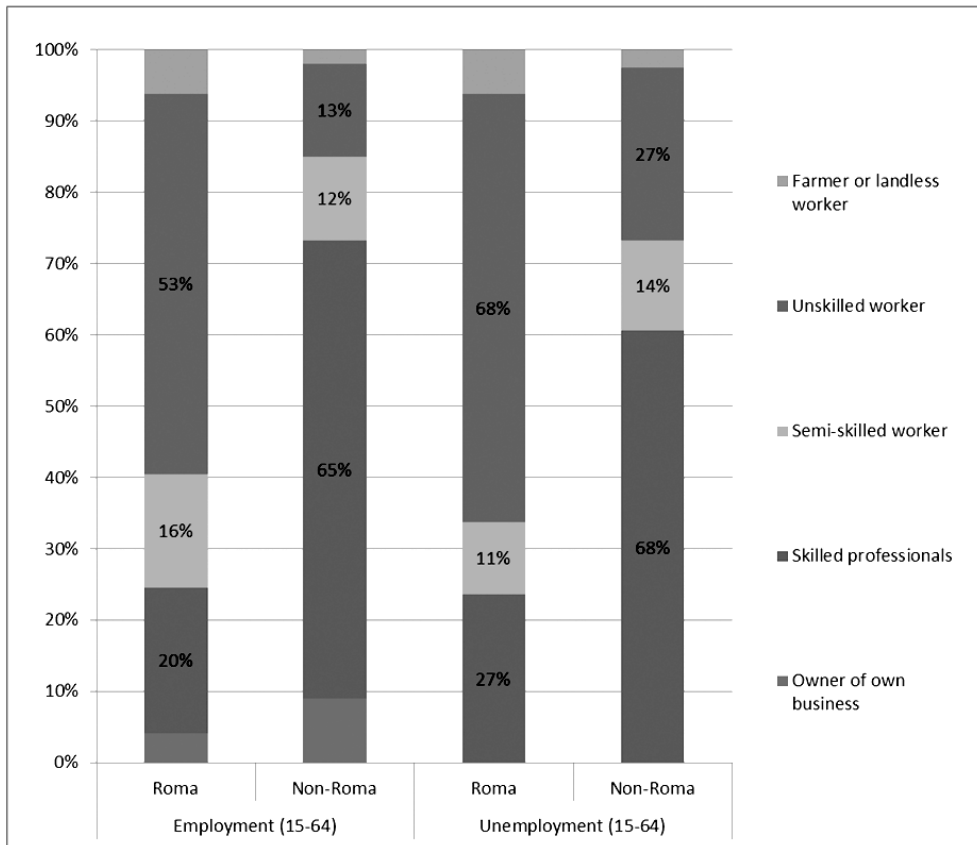


Figure 8: Professional qualification of the employed and the unemployed

registered and 18% of the non-registered Roma unemployed.²² Given the fact that the data reflect respondents' self-assessment, it would be safe to assume that they tend to overestimate their qualifications and the extent to which they meet the demand of the labour market.

Unsurprisingly, the share of the unemployed without work experience is much higher among the Roma than the non-Roma (29% and 11% respectively). Again, the largest is the difference among women - 33% of the unemployed Roma women have never worked and only 6% of the unemployed non-Roma women have. The gap among men is smaller – 25% of the unemployed Roma and 15% of the unemployed non-Roma men have never worked.

The structure of employment and unemployment by occupation provides interesting insights about the challenges Roma are facing on the labour market. Gen-

²² Metodieva ... Op.cit., Page 115. It should, however, be noted that this distribution is based on single choice question, whilst not finding a job is a complex outcome and difficult to reduce to one single factor.

erally, the structure of unemployment reflects the structure of employment. In the case of Roma, both the group of employed, as well as that of the unemployed are dominated by unskilled and semi-skilled labourers (69% of the employed and 79% of the unemployed). Among the non-Roma, the skilled workers constitute the biggest group of the unemployed. Looking at specific occupations, 24% of the employed Roma declare to be employed in the agriculture and forestry, which emerges as the main employment provider for this group (10% of the employed non-Roma are employed in this sector). The next most popular sector providing employment opportunities for Roma is construction, followed by industry and utility services. The relatively high contribution of utilities to Roma employment most likely occurs due to temporary work schemes. On the other hand, most unemployment Roma were previously employed in the construction sector (18% of the unemployed), while in the case of non-Roma it is the industrial sector (29% of the unemployed). The decline amongst Roma was most likely caused by the burst of the construction bubble, while in the case of non-Roma – by the overall decline in industrial production.

One interesting case is that of “other services (hairdressing, tailoring, cleaning, etc.)”, which encompass as much as 13% and 6% of the unemployed Roma and non-Roma respectively. The reported high share of such professions may reflect the cyclical nature of NGOs-driven attempts for local level employment through training and skill building. Since, in most cases, the skills being developed are not determined on the basis of potential employers’ demand, they often follow the current popularity reflected by peers’ experience. Thus, for example, one might find concentrations of particular professions in some communities, despite the fact that the local market for the services they provide is incomparably smaller.

POOR HEALTH AND HOUSING CONDITIONS

According to the available data, non-Roma complain of bad health more often than Roma (15% compared to 12%), which may be due to the relatively younger Roma sample.²³ The gap between men and women is also more pronounced. The share of Roma males assessing their health as “bad” is lower than that of the non-Roma males by 2% (11% and 13% respectively), while the gap between Roma and non-Roma women is five percentage points (13% and 18% respectively). While Roma report to be slightly healthier, they have a much lower medical insurance coverage – only 48% of Roma have medical insurance compared to 85% of non-Roma.

²³ For an in-depth analysis of the health challenges faced by the Roma in Bulgaria, Greece, Spain, Portugal, Romania and Slovakia see Томова, Илона; Николова, Станислава. (2011). В огледалото на различието: здравен статус и достъп на ромите до здравеопазване. София, АИ „Проф. Марин Дринов. For a comparative analysis of the health challenges in the countries of Central and Eastern Europe based on the UNDP data set see Mihailov, Dotcho. (2012). The health situation of Roma communities: Analysis of the data from the UNDP/World Bank/EC Regional Roma Survey 2011. Roma Inclusion Working Papers. Bratislava: UNDP.

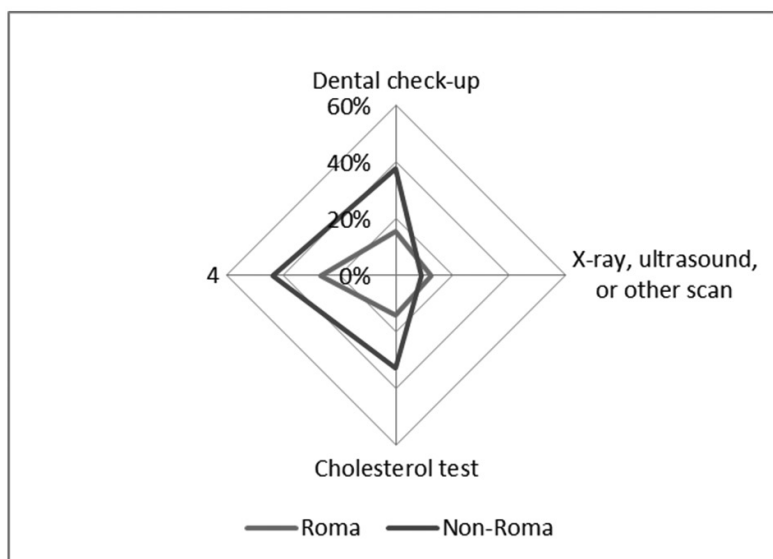


Figure 9: Incidence of specific medical checks

While not as dramatic, there is also a significant difference in the access to health services between Roma and no-Roma – 85% and 97% respectively.²⁴ Generally, Roma visit the doctor for specific medical checks less often than non-Roma patients. Figure 9 shows the incidence of specific medical checks.²⁵

The “availability of medical services” usually has two dimensions – access and affordability. Roma show asymmetrical performance on both. They have access in general, but material factors serve as a constraint (Figure 10). As much as 70% of the Roma cannot afford to buy the medicines prescribed by a doctor (compared to 21% of the non-Roma).²⁶ The financial difficulties that the health insurance system in Bulgaria is facing may further deteriorate the effective access to health of the Roma.

²⁴ Share of people living in the households having access to health services when needed as a percentage of all population living in households for which this question was replied.

²⁵ The indicator is defined as: Share of adult persons (16+) who had a given medical test (dental check-up; x-ray, ultrasound, or other scan; cholesterol test; heart check-up) in the last 12 months as a percentage of all adult persons who replied to this question.

²⁶ Share of people living in households that could not afford to purchase medicines prescribed to/needed by a member of this household as a percentage of all population living in households for which this question was replied.

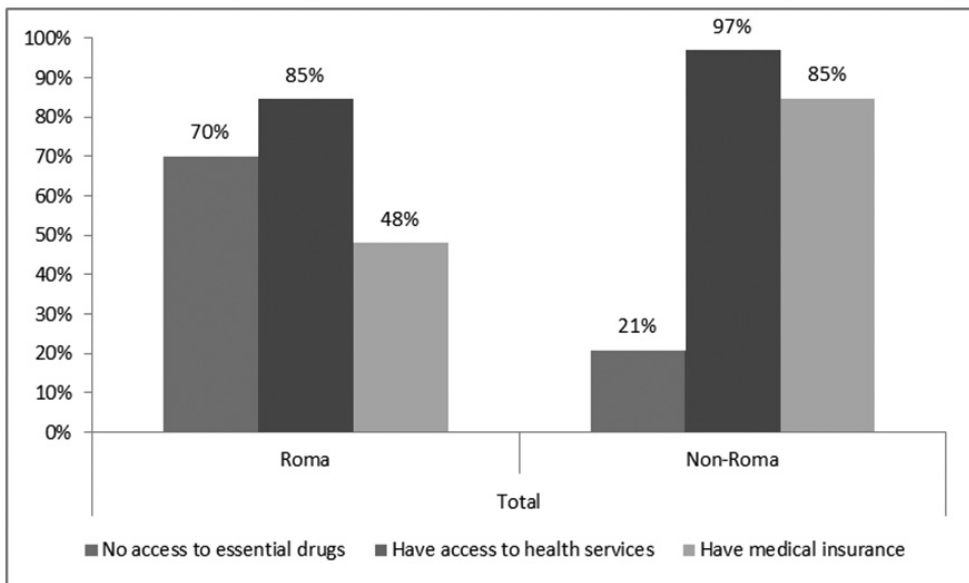


Figure 10: Affordability of medical services

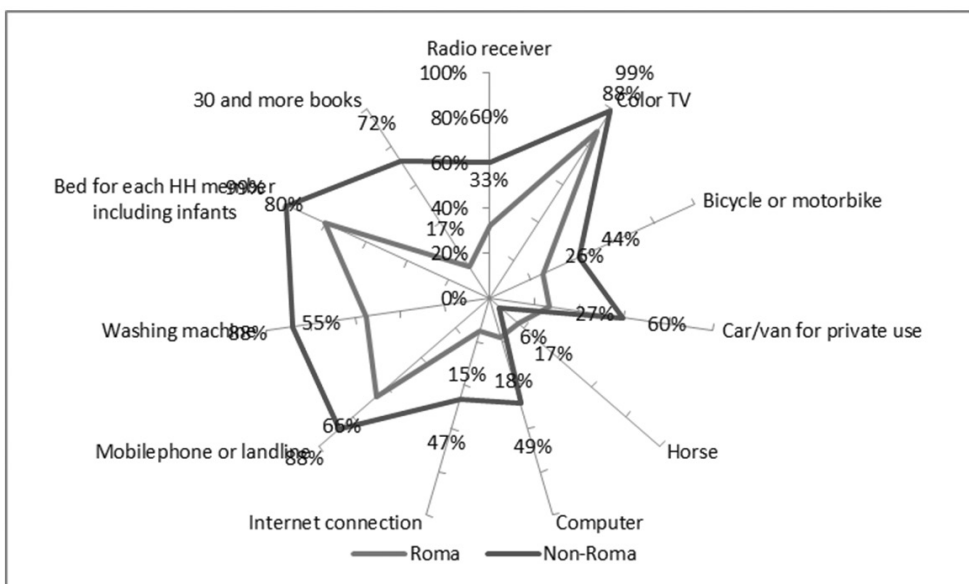


Figure 11: Access to household amenities

HOUSING POVERTY

It is not particularly revealing that the housing conditions of the Roma are appalling.²⁷ The methodology of sampling is based on the territorial distribution of Roma in visibly identifiable settlements at risk of marginalisation. It is not surprising that the share of respondents observing positive change in their neighbourhoods is similar among Roma and non-Roma (13% and 12% respectively). This is not surprising given the fact that the non-Roma sample constitutes of populations living in close proximity to the Roma neighbours.

However, the similarities end here, despite the territorial proximity of the two groups. There are several stark differences in the living conditions of the Roma and the non-Roma. The first is that the former have almost half the living space per household member at their disposal compared to the non-Roma – 13.86m² versus 25.63m². This fact is also highlighted by the fact that as much as 20% of the Roma do not have an access to secure housing²⁸ (compared to 2% of non-Roma population). The situation is also worrying in regards to the access to basic infrastructures.²⁹ Such usually end right before a Roma neighbourhood – paved roads and sewages in particular. Most of Roma households have access to electricity and improved water source (piped water in the yard or from a public tap). However, over 40% of their households have no access to improved sanitation, or piped water inside the dwelling, which is crucial for the maintenance of basic hygiene standards; 5% live without any access to improved water source.³⁰

The degree of well-being (seen through the lens of possession of basic household appliances) is also different for the two groups.³¹ While almost all households, regardless of their ethnicity, have a colour TV, the possession of other conveniences is not equally spread. 55% of Roma households have a washing machine, whereas 66% have mobile phone, or a landline. Bicycles and cars for personal use are almost equally preferred by Roma households: 26% have a bicycle, or a motorbike, and 27% have a car, or a van. Figure 11 visualises the differences between the two groups regarding the possession of major items (but lacks information about their quality). It also reveals a number of alarming facts. While almost all non-Roma household members (99%) have a personal bed, only 80% of the members of Roma households have one. Roma households fall drastically behind on items related to access to knowledge such as computers, books, or Internet access. “Having a horse” is the only

²⁷ For an in-depth analysis of the housing challenges faced by the Roma see. Perić, Tatjana. (2012). *The Housing Situation of Roma Communities: Regional Roma Survey 2011*. Roma Inclusion Working Papers. Bratislava: UNDP.

²⁸ Share of people living in ruined houses, or slums (as evaluated by enumerators) as a percentage of all surveyed population.

²⁹ Share of population living in HHs that have piped water inside the dwelling, or in the garden/yard, having a toilet, or bathroom inside the dwelling, or ones which have access to electricity in their dwelling as a percentage of all surveyed population.

³⁰ Data on access to electricity are identical to those of the World Bank study and Open Society. However, there are discrepancies regarding the access to drinking water and the availability of a toilet in the dwelling. This is due to differences in definitions “improved water source” and “waste water treatment”.

³¹ Share of people living in HHs possessing individual items as a percentage of all surveyed population.

area in which Roma are better off compared to non-Roma – one sixth of the Roma households possess one, which is related to the pattern of their survival and income generation strategies.

Waste collection is less frequent in the case of the neighbourhoods inhabited by Roma.³² Similarly to the access to basic infrastructures, both groups do not have the same access to communal services, despite their territorial proximity. Garbage is being collected once a week in the case of 51% of the Roma and 62% of the non-Roma households. Similar shares (18% of the Roma and 17% of the non-Roma) of people have their waste collected on average twice a week. 30% of the Roma and 21% of the non-Roma report their garbage not being collected regularly, or not collected at all.

INTEGRATED PROXY OF OUTCOME-LEVEL POVERTY

The “well-being” dimensions of poverty outline its multidimensional nature beyond lack of money. They are important for the simple reason that each of those dimensions has a dual nature – it is both an outcome and a determinant of poverty. This is why it is necessary to conceptualise poverty as a complex multidimensional phenomenon, quantifying and monitoring it through multidimensional indicators.

One of them is the Material Deprivation Index monitored by the EU Member States. The data allows for calculating this index in the case of Roma and their

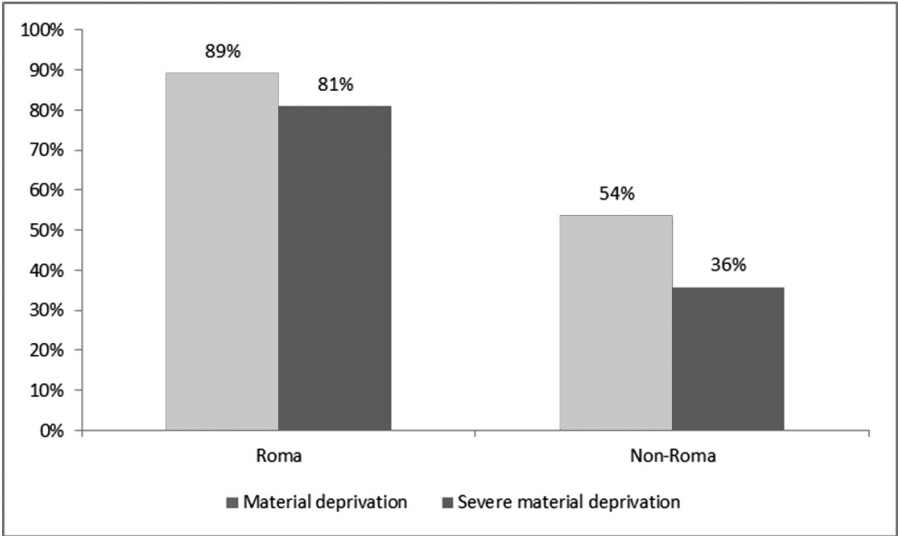


Figure 12: Adjusted EU Material Deprivation Index

³² Share of people living in the households with a given frequency of waste collection as a percentage of all surveyed population

non-Roma neighbours in its two options – as an index of “material deprivation” and of “severe material deprivation”.³³ Figure 12 represents the shares of people from each community that face material, or severe material deprivation. The data suggest that most Roma fall under the category of “severe deprivation.” The distance between the two categories of deprivation is substantively larger in the case of non-Roma.

LOOKING BEYOND THE MATERIAL WELLBEING – MULTIDIMENSIONAL POVERTY

The Material Deprivation Index is undoubtedly a step forward in comparison to the unidimensional, sector-oriented indicators. However, it also has its limitations, for example it only reflects the material aspects of wellbeing.

FROM “BASIC NEEDS” TO “HUMAN DEVELOPMENT”

The human development concept is an attempt for reflecting the nonmaterial aspects of human progress. Its roots reach as far back in history as Ancient Greece (Aristotle), but it has been operationalised for policy-making purposes in 1990 when UNDP published its first human development report. It was largely inspired by Amartya Sen³⁴, who argues that well-being comes from a capability to function in a society. Thus, poverty arises when people lack key capabilities and thus have inadequate incomes, education, or poor health, live in insecurity with low self-confidence and a sense of powerlessness, or there is an absence of rights such as freedom of speech. All of those factors could limit their capabilities and ultimately reduce their freedoms.³⁵

The idea behind the human development concept is simple, intuitive and at the same time extremely rich. From human development perspective, money is just a mean for expanding “people’s freedoms to live long, healthy and creative lives; to advance other goals they have reason to value.”³⁶

The concept of „human development” is not the first attempt to look at poverty through a human perspective. In 1976, the ILO published its report “Employment, growth and basic needs” which launched the idea of “basic needs” at the level of

³³ It is assumed that an individual experiences material deprivation when at least three of the following items are missing (1) ability to pay rent, mortgage, or utility bills, (2) ability to keep the house adequately warm, (3) ability to face unexpected expenses, (4) eating meat, or proteins regularly, (5) availability to go on holiday, (6) a TV set, (7) a washing machine, (8) a car, (9) a telephone. When at least four, or more, items lack in the household, its members experience severe material deprivation.

³⁴ Sen, Amartya. 1987. *Commodities and Capabilities*. Amsterdam: North-Holland.

³⁵ Sen, Amartya. (2000). *Development as freedom*. Anchor books: New York, pp. 87-110.

³⁶ UNDP (2010). *Human Development Report 2011. The Real Wealth of Nations: Pathways to Human Development*, c. 22.

international development policies.³⁷ Key among these needs are available material standards of decent living, access to education, health care and the availability of housing. These are important areas of human development as well, and the two concepts are often confused. The difference between the two is in the presence (or absence) of *agency* – the freedom, the desire and the ability of the individual to take the responsibility for his/her own destiny.

The ILO did not introduce an integrated indicator for measuring progress in the area of “basic needs” in 1976 – UNDP did that in 1990 with the “human development index,” which emerged as a better alternative to the GDP (and hence, the monetary metrics) as a quantifier of human progress. Still, HDI does not cover the *agency*. Thus – a true paradox – the index of “human development” is actually an index of “basic needs.”³⁸

FROM “HUMAN DEVELOPMENT” TO “MULTIDIMENSIONAL POVERTY”

The Human Development Index is a multidimensional and composite indicator – but an indicator of the achievement, of the progress (and not of the deficits and poverty). The differences between the two aspects are not just terminological. One might “revert” the HDI to a certain extent and use the distance to the maximum values of its components as a gauge of certain deficits. However, the determinants of success cannot be reverted to explain the failures. A true multidimensional index of poverty is the one elaborated by the OPHI.³⁹

Multidimensional poverty encompasses a range of deprivations that a household may suffer from. The number of specific indicators used depends on the purpose of the measure. At a glance, multidimensional measures present an integrated view of the situation. The Multidimensional Poverty Index denotes overlapping deprivations at the household level across the same three dimensions, similarly to the Human Development Index (living standards, health, and education) and shows the average number of poor people and deprivations with which poor households are contended.⁴⁰

The multidimensional poverty approach is particularly appropriate for addressing the issue of Roma poverty exactly due of the multidimensional nature of deprivation and marginalisation that the Roma are facing. Roma poverty is not just a lack of financial resources, unemployment, substandard housing, or poor access

³⁷ ILO. (1976). *Employment, Growth and Basic Needs: A One-World Problem*. Geneva: ILO. Of course, the concept of “basic needs,” as formulated by the ILO, is not the only one that goes beyond money as a measure of well-being ones. Detailed analysis of the approaches in this area, however, is beyond the scope of this analysis.

³⁸ Ivanov, Andrey. (2009). Internalizing the human development paradigm: reflections of a witness. *Development and Transition*, Issue 14, December 2009, <http://www.developmentandtransition.net/Single-Article-Issue.118+M5bf04ff3d08.0.html>

³⁹ <http://www.ophi.org.uk/research/multidimensional-poverty/>

⁴⁰ <http://www.ophi.org.uk/multidimensional-poverty-index/mpi-faqs/>

to social services. It is a combination of all those factors that are both the outcomes of past spells of exclusion, as well as determinants of future deprivations reinforcing the vicious circle of poverty. This circle is being reinforced by prejudice and discrimination, specific behavioural traits, limited opportunities to participate in the political process, etc. The multidimensional nature of Roma poverty and its determinants call for a 'human development' and not just 'basic needs' concepts. The appropriate approach for most marginalised communities should integrate reduction of material deprivation with agency and fundamental rights agenda. Unemployment, social exclusion and marginalisation are interlinked with (and are mutually reinforcing) discrimination, anti-Gypsyism, limited access to justice and segregation.

MULTIDIMENSIONAL POVERTY INDEX

In order to capture these aspects of Roma deprivation, the multidimensional poverty index has been developed and tested following the standard Alkire and Foster methodology. The index integrates important aspects of human poverty, reflecting appropriately the specifics of Roma exclusion.

THE INDEX CONSTRUCTION

The index reflects the status of the individuals (including their characteristics) living in households (including their characteristics) and facing certain number of deprivations. The index integrates 12 equally weighted indicators reflecting the status in six dimensions that are seen as crucial from the human development perspective (basic rights, health, education, housing, standard of living, and employment). The status of the individuals in each dimension is tracked by two indicators per dimension. The first three dimensions cover the area of "Human capabilities" of which basic rights, education and health emerge as particularly important.⁴¹ The second group covers the major aspects of "Material wellbeing."

The index is calculated on the basis of individual status of each member of the household. This status is either a personal characteristic of the individual, or a condition of the entire household shared by all its members and extrapolated as an individual parameter to each household member. Table 2 summarises the specific indicators, dimensions and areas as well as the level of information for the individual indicators (individual or household).⁴²

⁴¹ Obviously, the entire palette of fundamental rights is far richer than the two indicators - the availability of personal documents and discrimination. It includes the right to work, protection of individual security, etc. However, both indicators largely reflect the presence, or absence, of the necessary conditions for the realization of other fundamental rights.

⁴² For a detailed description of the methodology of the index and its components see: Ivanov and Kagin, op.cit.

Table 2

Dimensions and indicators of the “Roma multidimensional poverty index”

Area	Dimension and weight	Indicators	Criterion of deprivation and threshold	Level of observation
Human capabilities	Basic rights (1/6)	Civil status	Having an ID – yes/no (personal document, birth certificate etc.)	I
		Discrimination	A composite indicator integrating experience and perception of discrimination	P
	Health (1/6)	Disability status	A household member having a disability – yes/no	I
		Limited access to medical services	Any HH member living in a HH responding “yes” to the question “were there any periods in the past 12 months when you couldn’t visit a doctor when you needed?”	P
	Education (1/6)	Highest completed education	For adults: any HH member above schooling age who hasn’t completed primary education or lower For children: children in school age who are not in school	I
		Self-declared illiteracy rate	Any HH member stated as unable to read and write	I
Material wellbeing	Housing (1/6)	Access to basic infrastructure	A composite indicator –any HH member living in a HH without two of the three (toilet or bathroom inside the house; running water; electricity)	H
		Shares of the population not having access to secure housing	Any HH member living in “ruined houses” or “slums”	
	Standard of living (1/6)	Extreme poverty	Any HH member living in a HH that experienced that in the past month somebody ever went to bed hungry because they could not afford enough food for them	H
		Access to various HH amenities	Any HH member living in a HH, which doesn’t possess four of six categories falling in “UNDP material deprivation” index	I
	Employment (1/6)	Unemployment	Any HH member living in a household with none of the adult HH members employed (16+).	H
		Lack of working experience	Any HH member living in a HH in which the HH head or his/her spouse has no working experience	H
Level of observation of the respective indicators: I – individual status of each household member P – the experience and perception of the main respondent extrapolated to all household members H – the status (vulnerability) of the household along certain parameter extrapolated to all household members				

One cut-off line with two levels was applied in determining the multidimensional poverty status: one for “multidimensionally poor” and one for “severely multidimensionally poor”. People experiencing between 5 and 7 deprivations were considered “multidimensionally poor,” and those experiencing 8 or more deprivations – as “severely multidimensionally poor”. Unlike the Alkire-Foster MPI methodology, no cut-off within dimensions was applied because of the limited number of deprivations in each dimension (2) and the dichotomous nature of most variables.

The methodology of multidimensional poverty allows for integrating in one index the poverty rate (the share of people experiencing 5 or more deprivations) and the severity of poverty (the average number of deprivations experienced by those in poverty). The Multidimensional Poverty Index (MPI) is the share of the poor multiplied by the average number of deprivations. Figure 13 presents the multidimensional poverty profile of Roma in Bulgaria and the change between 2004 and 2011. The left scale of the figure denotes the multidimensional poverty headcount (the share of people facing deprivation or extreme deprivations) and the right scale of the figure denotes the Multidimensional Poverty Index (the M-poverty headcount multiplied by the average number of experienced deprivations).

As Figure 13 shows, the multidimensional poverty rate of Roma has decreased substantially between 2004 and 2011. This is clearly an achievement. Similarly, the value of the MPI has declined. However, the decrease was mainly among the “poor” and not among the “severely poor”, suggesting that the problem of extreme poverty among Roma remains an issue.

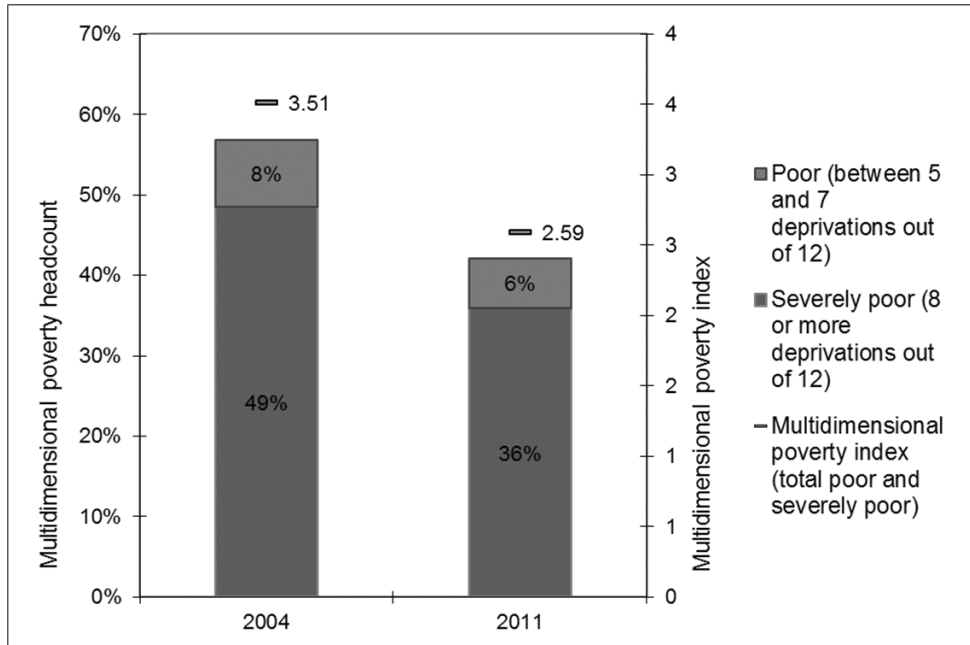


Figure 13: Multidimensional poverty rate and its composition for Roma (2004-2011, left scale) and the value of MPI (right scale)

Table 3 sheds additional light on the profile of multidimensional poverty. The number of deprivations that both groups face changed insignificantly between 2004 and 2011 (from 6.18 to 6.15 in the case of Roma and from 5.80 to 5.52 in the case on non-Roma). While the progress in poverty reduction among Roma was achieved through taking a part of the poor out of poverty, those who remain in poverty are as poor as they were before. The data also shows increase in non-Roma multidimensional poverty, albeit minor (from 4% in 2004 to 7% in 2011). Given the difference in absolute numbers of the respective groups, this is a point of concern and an argument in favour of integrated approaches to poverty reduction at local levels, addressing Roma and non-Roma populations alike.

Table 3

**Basic parameters of multidimensional poverty in Bulgaria (Roma and non-Roma)
in 2004-2011**

		Share of people in multidimensional poverty			Average number of deprivations			Multidimensional Poverty Index (MPI)		
		Poor	Severely poor	Total	Poor	Severely poor	Total	Poor	Severely poor	Total
Roma	2004	49%	8%	57%	5,81	8,31	6,18	2,82	0,69	3,51
	2011	36%	6%	42%	5,75	8,53	6,15	2,07	0,52	2,59
Non-Roma	2004	4%	0%	5%*	5,56	8,00	5,80	0,23	0,04	0,26
	2011	7%	0%	7%	5,43	8,00	5,52	0,36	0,02	0,37

* The sum reflects the values after the decimal

COMPARING THE DIFFERENT APPROACHES

Figures 14a and 14b illustrate how different approaches to identifying and quantifying poverty actually work. The first one shows the share of individuals that fall into the category of “poor” according to three approaches (absolute, relative and multidimensional poverty). The second shows the same in terms of material deprivation and multidimensional poverty.

As Figure 14a (left side) shows, 29% of the Roma living at risk of marginalisation are “relatively poor”, but not absolutely poor, nor multidimensional poor. 10% of them are poor both relatively and absolutely, while 19% are poor both relatively and multidimensionally. Only 21% are poor in all three definitions. The share of those who are poor only multidimensionally, or just absolutely is negligible. The share of people who are not poor along any of the criteria applied is only 19%.

The degree of overlap is highest between the multidimensional poverty and material deprivation (Figure 14b). One might say “this is because multidimensional poverty is included in the MPI”. However, the former constitutes only 1/12th of the latter.

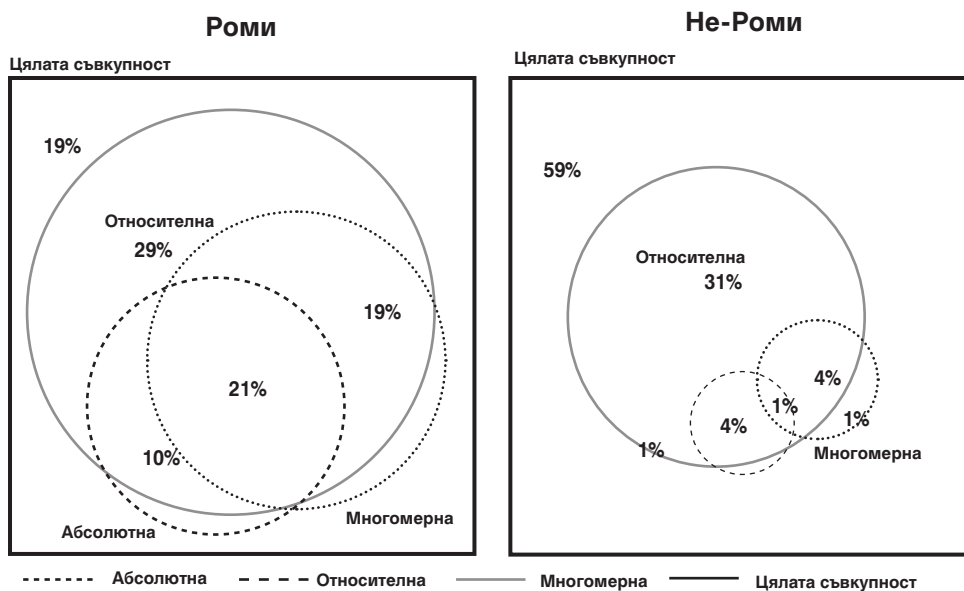


Figure 14a: Overlaps between absolute, relative and multidimensional poverty estimates

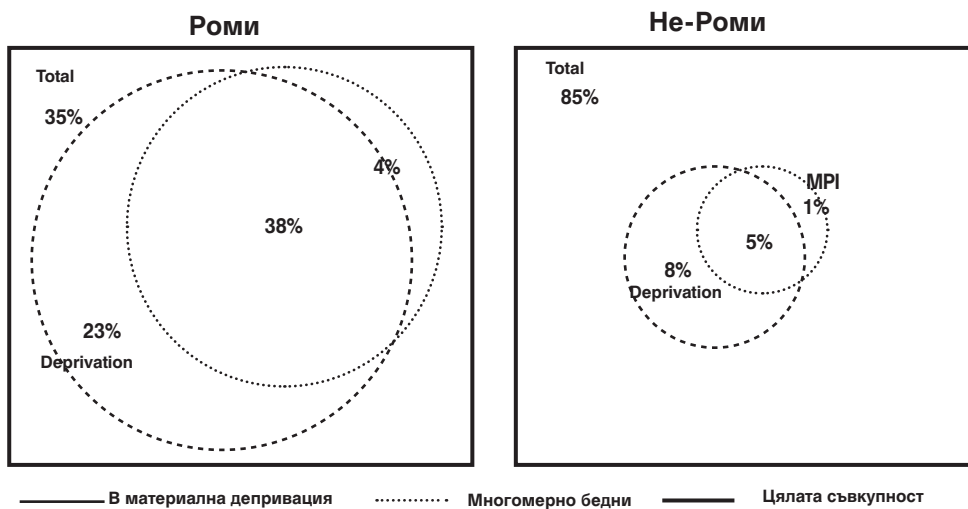


Figure 14b: Overlaps between material deprivation and multidimensional poverty estimates

APPLICATION OF THE INDEX

The illustration above prompts the simple question “which of all the approaches is the appropriate one?” The answer is “it depends on the purpose of the exercise.” If it is just highlighting the differences in poverty levels, the simplest (monetary poverty estimates) approaches are sufficient. However, if the purpose is to understand the roots of Roma poverty and make progress in improving it, it is necessary to address the task from a human development perspective, which means going beyond the monetary estimates, deconstructing poverty and identifying individual problem zones requiring targeted sector-specific interventions.

The multidimensional poverty analysis makes that possible. Apart from helping to highlight the scale of the phenomenon, it also enables both the specification of what contributes to the ultimate “multidimensional poverty” outcome, as well as in what ways. Figure 15 illustrates the structure of the average deprivations of the multidimensional poverty index. In other words, it shows which dimensions contribute most significantly to the final outcome. Respectively, it suggests which areas might be prioritised in the policy reduction efforts.

As the Figure shows, the average number of deprivations experienced by Roma decreased slightly between 2004 and 2011. Those who are multidimensionally poor have remained equally poor, but in a different way. While the contribution of education and living conditions to multidimensional poverty has declined, that of the fundamental rights and labour activity has increased. How these changes relate (or not) to the policies implemented during that period is beyond the scope of this article, but such an analysis is both possible and necessary.

The multidimensional poverty profiles allow for an in-depth analysis of the different socio- economic and behavioural characteristics and their correlation with the

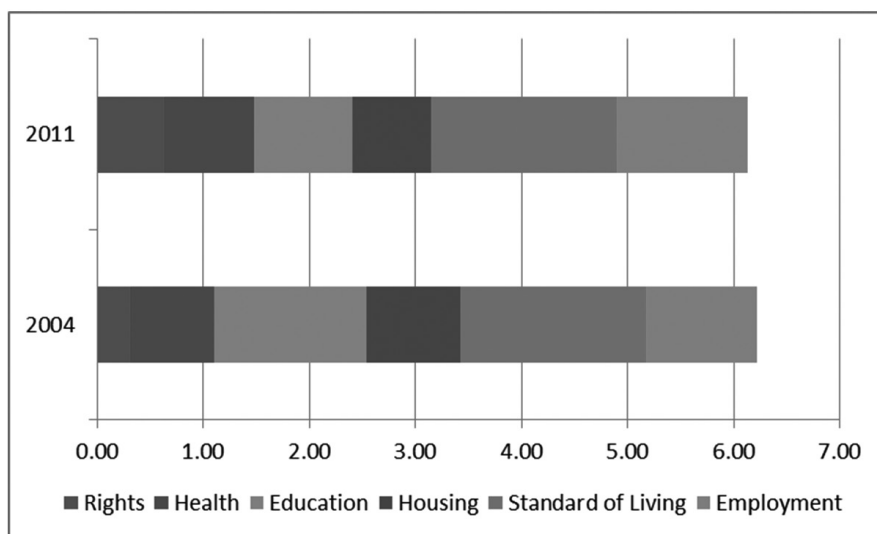


Figure 15: Contribution of deprivations to multidimensional poverty, Roma (2004-2011)

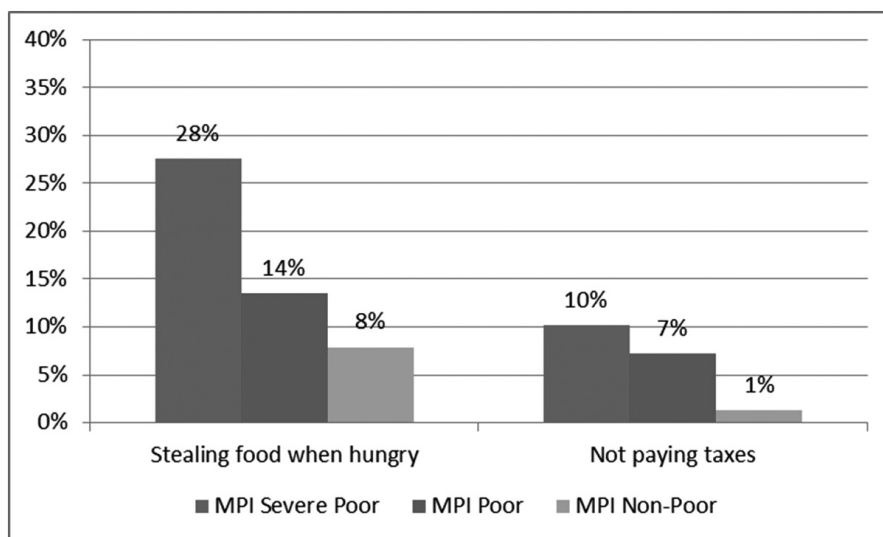


Figure 16: Behavioural patterns by poverty categories

level of poverty. Figure 16 illustrates to what extent certain behaviours are acceptable (the share of respondents in the respective poverty category answering affirmatively to the question “yes, entirely permissible”). As the Figure shows, extreme poverty is correlated with a lower threshold of intolerance towards petty household theft for the sake of own survival, or tax evasion. Although “correlation” does not imply “causality,” in this case it is obvious that the reduction of extreme poverty would result in a reduction of such incidents, to which the non-Roma majority is hypersensitive.⁴³

Figure 17 illustrates the extent to which one particular survival option – production of food for own consumption – is widespread among different groups. The share of those producing food for own consumption is lowest among the severely poor – mostly due to the lack of resources (land and capital) and skills. Both go hand in hand with a minimum level of well-being.

Finally, it is worth revisiting the educational challenges through the lens of multidimensional poverty. Figure 18 shows the distribution of the adult members of the Roma and non-Roma households by category of poverty and the highest educational level attained. The fact that the severely poor are also uneducated is extremely alarming in itself. However, the difference in the educational profiles between the “moderately poor” Roma and non-Roma (experiencing similar number of deprivations)

⁴³ This hypersensitivity is a phenomenon worthy of a separate study. On the one hand, the polarization among ethnic Bulgarians and the emergence of extreme poverty lowered down the social solidarity threshold, making it easier for scapegoating those to “blame” for their pauperisation – and the “Gypsy” is a convenient target. On the other hand, the mass attitudes are easy to manipulate in order to distract from the real political failures. Household burglaries, as irritating as they might be, cannot be seriously considered as the cause of declines in entire industries, or of asset stripping.

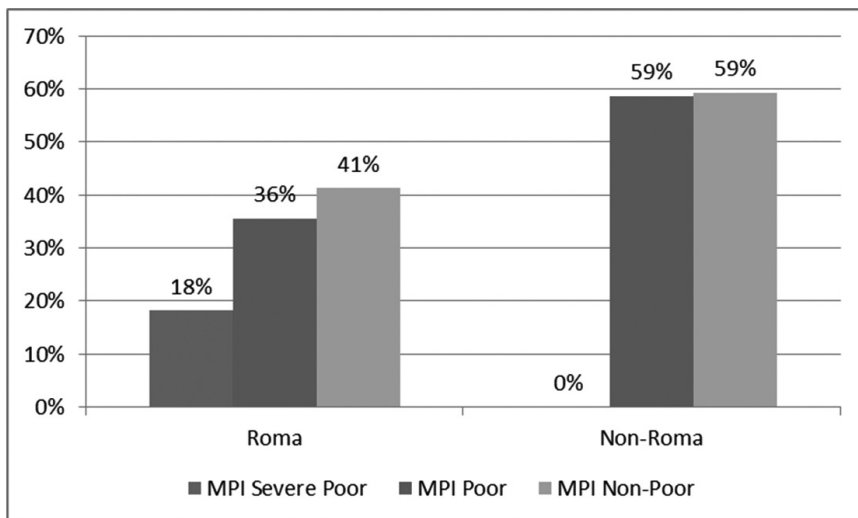


Figure 17: Production food for own consumption

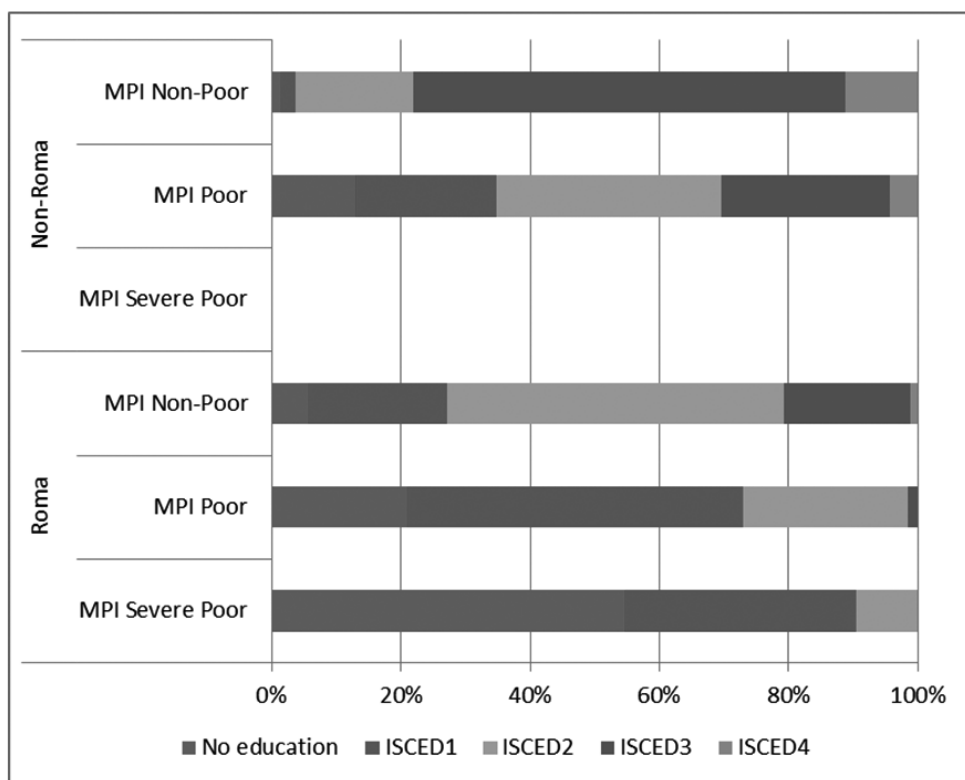


Figure 18: Highest educational level achieved (share of the adult members of the households aged 25-64 who completed their education with respective level)

is striking. The number of “severely poor” non-Roma is negligible and this is why missing from the Figure.

CONCLUSIONS

The analysis suggests several important conclusions about the specifics of Roma poverty and the relevance of different approaches to its quantification and monitoring.

First, the numbers are important - but in order to properly understand them, they need to be examined and analysed in a broader context. Second, a wide range of methodologies for measuring poverty exist. The choice of the particular approach should be guided by the priorities of the current policy. Poverty monitoring cannot be guided by pure research curiosity. The ultimate purpose is to better understand the underlying mechanisms and the factors determining poverty – and help overcome them.

The specifics of Roma poverty require multidimensional approaches. The proposed multi-dimensional poverty index is one example of such an approach.

Qualitative data is a key element in such deeper understanding. It is not just the socio-economic statistics that matter (there are a lot of such data), but the more comprehensive picture of the values and behavioural patterns of individuals in the context of which they make their daily decisions. A lot of knowledge has been accumulated in this regard, but these are not sufficient data that can be analysed and correlated with socio-economic indicators. This is an area requiring further work.

REFERENCES

- Alkire, S.** (2008). “Choosing Dimensions: The Capability Approach and Multidimensional Poverty”, In: Kakwani, N. and Silber, J. (2008). *The Many Dimensions of Poverty*, New York: Palgrave Macmillan, pp. 89-119.
- Alkire, S.** (2009). ‘Conceptual Overview of Human Development: Definitions, Critiques, and Related Concepts’ Background paper for the 2010 Human Development Report.
- Alkire, S., Foster, J.** (2009). *Counting and Multidimensional Poverty Measurement (Revised and Updated)*, OPHI Working Paper No. 32. Oxford: University of Oxford.
- Bogdanov, L., Angelov, G.** (2006). *Integration of Roma in Bulgaria: Necessary Reforms and Economic Effects*. Open Society: Sofia.
- Bruggemann, Chr.** (2012). *Roma Education in Comparative Perspective. Analysis of the UNDP/World Bank/EC Regional Roma Survey 2011*. Roma Inclusion Working Papers. UNDP: Bratislava.
- Chen, Sh., Ravallion, M.** (2007). *Absolute Poverty Measures for the Developing World, 1981-2004*. Policy Research Working Paper 4211. World Bank: Washington, D.C.
- Coudouel, A., J. Hentschel and Q. Wodon** (2002). *Poverty Measurement and Analysis*. World Bank: Washington D.C.
- Cukrowska, E., Kóczé, A.** (2013). *Interplay between gender and ethnicity: exposing structural disparities of Romani women. Analysis of the UNDP/World Bank/EC regional Roma survey data*. Roma Inclusion Working Papers. UNDP: Bratislava.
- De Laat, J., Bodewig, Chr.** (2011). *Roma Inclusion is Smart Economics - Illustrations from Bulgaria, Czech Republic, Romania and Serbia*. World Bank, ECA Knowledge Brief 39, April 2011.

- FRA** (2014). Roma Pilot Survey – Technical report: methodology, sampling and fieldwork.
- Gordon, D.** (2002). International measurements of poverty and anti-poverty policies. In: Townsend, Peter and Gordon, David (eds.). *World Poverty: New Policies to Defeat an Old Enemy*. Bristol: Polity Press.
- ILO** (1976). *Employment, Growth and Basic Needs: A One-World Problem*. ILO: Geneva.
- Ivanov, A., Kling, J., Kagin, J.** (2012). Integrated household surveys among Roma populations: one possible approach to sampling used in the UNDP-World Bank-EC Regional Roma Survey 2011. Roma Inclusion Working Papers. UNDP: Bratislava.
- Ivanov, A.** (ed.). (2006). *At Risk: Roma and Displaced in South-East Europe*. Regional human development report. UNDP: Bratislava.
- Ivanov, A.** (2009). Internalizing the human development paradigm: reflections of a witness. *Development and Transition*, Issue 14, December 2009.
- Ivanov, A.** (2012). Quantifying the Unquantifiable: Defining Roma Populations in Quantitative Surveys. *Население* Issue no.3-4 /2012, pp. 79-95.
- Ivanov, A., Kagin, J.** (2014). Roma poverty in a human development perspective. Roma Inclusion Working Papers. UNDP: Bratislava (forthcoming).
- Kakwani, N. Son, Hyun H.** (2006). New Global Poverty Counts, Working paper no. 29. UNDP International Poverty Centre: Brasil.
- Lister, R.** (2004). *Poverty*. Polity Press: Cambridge.
- Mihailov, D.** (2012). The health situation of Roma communities: Analysis of the data from the UNDP/World Bank/EC Regional Roma Survey 2011. Roma Inclusion Working Papers. UNDP: Bratislava.
- O'Higgins, N.** (2012). Roma and non-Roma in the Labour Market in Central and South Eastern Europe. Roma Inclusion Working Papers. UNDP: Bratislava.
- Perić, T.** (2012). The Housing Situation of Roma Communities: Regional Roma Survey 2011. Roma Inclusion Working Papers. UNDP: Bratislava.
- Ravallion, M.** (2003). The Debate on Globalization, Poverty and Inequality: Why Measurement Matter?, Policy Research Working Paper 3038, World Bank: Washington D.C.
- Ravallion, M., Chen, Shaohua; Sangraula, P.** (2008). Dollar a Day Revisited. The World Bank Development Research Group, Policy Research Working Paper, 4620. World Bank: Washington D.C.
- Ruggeri Laderchi, C., Saith, R., Stewart, Fr.** (2003). Does it Matter that we do not agree on the Definition of Poverty? A Comparison of Four Approaches. QEH Working Paper Series, Working Papers 107. Oxford Development Studies.
- Sen, A.** (2000). *Development as freedom*. Anchor books: New York.
- Sen, A.** (1987). *Commodities and Capabilities*. Amsterdam: North-Holland.
- Tarnovschi, D. et al.** (2012). Roma from Romania, Bulgaria, Italy and Spain between Social Inclusion and Migration: comparative study. Constanta: Editura Dobrogea
- The World Bank.** (2000). *Attacking Poverty*. World Development Report. World Bank and Oxford University Press.
- UNDP** (2010). *Human Development Report 2011. The Real Wealth of Nations: Pathways to Human Development*.
- UNDP** (1997). *Human Development to Eradicate Poverty: Human Development Report*. UNDP: New York.
- Захариев, Боян; Йорданов, Илко.** (2010), Проучване на родителското участие в училищния живот в България. Отворено общество: София.
- Методиева, М. (координатор); Абрамова, Св., Белчева, Д.** (2012). Отвъд митовите и предразсъдъците: Ромите в България: EU inclusive - трансфер на данни и обмен на добри практики между Румъния, България, Испания и Италия, отнасящи се до включването на ромското население. Editura Dobrogea:
- Михайлова, Д.** (2013). Предизвикателства и подходи за гарантиране достъпа до електроенергия

в квартали с преобладаващо ромско население доклад малцинства, Отворено общество: София.

Пампоров, А. Социални и етнически стереотипи за малцинствата в България. Отворено общество: София.

Томова, И., Николова, Ст. (2011). В огледалото на различието: здравен статус и достъп на ромите до здравеопазване. АИ „Проф. Марин Дринов: София.

РОМСКАТА БЕДНОСТ В БЪЛГАРИЯ – ЩО Е ТО И КАКВО ОТ ТОВА?

Андрей Иванов

***Резюме.** В статията се анализира въпросът за бедността на ромите и възможните начини за нейното квантифициране. В уводната си част авторът представя основните концепции и подходи към дефиниране на бедността, след което ги прилага по отношение на ромите, използвайки данните за състоянието на ромските домакинства на ПРООН, Световната Банка и Европейската Комисия. Авторът стига до извода, че за следене на многомерен феномен като ромската бедност е необходим многомерен индикатор. В третата част на статията се предлага и тества такъв индикатор, интегриращ основните аспекти на ромската бедност и позволяващ да се открие количествения принос на всеки от тях към общия резултат „бедност и социално изключване.“ Според автора, това прави предлаганата методика особено релевантна за целите на текущите политики за преодоляване на бедността при ромите.*

Ключови думи: интеграция на ромите, маргинализирани групи, наблюдение на бедността